

JohnnyFusion Inc.



# Demo User Guide

V1.0

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Companion to the

## Proposal

Refinement and Enhancement  
To  
Stewardship Contact Database  
Using MS-Access

for

**Credit Valley Conservation**

Prepared by  
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JohnnyFusion Inc.

**7 January 2013**

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### Revision History

V1.0    Original (Draft) 7-Jan-2013

## Overview

### caveat

*This document describes the use of the demonstration application developed to support the proposed refinement and enhancements to the existing Credit Valley Conservation Stewardship Contact Database application. It is solely for the purpose of demonstrating that this applicant understands the information in the Request for Proposal and can provide an outstanding solution. This website will be erased in its entirety should we be advised that our proposal was not successful. The use of the CVC logos is solely to support this demonstration.*

This document describes how to use the Credit Valley Conservation's Stewardship Contact Database.

This is a web based application and the user will need authorization credentials from the administrator to use the application.

With this application, guest users can query the database to find people, places and activities. Qualified users have much more functionality and may add, change and delete content.

Please refer to the appropriate section:

- Guest Users Guide (pg 6)
- Power Users Guide (pg 16)

Also please be familiar with the **Notes on Using the Application** (pg 5)

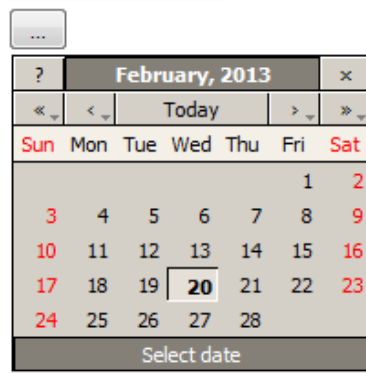
## Notes on Using the Application

### Session Timeout

If the application is inactive for more than 40 minutes, it will require that you re-enter your login credentials to continue.

### Dates

Where a searchable/sortable date is expected on a form, there will be a button that opens a calendar. Using this calendar is the preferred method for entering dates. Dates are displayed in the dd-mmm-yy format to reduce errors with the dd/mm or mm/yy formats when the day number is ambiguous.



## Guest User's Guide

To use this application, you need to open a web based internet browser like Internet Explorer, Firefox, Chrome or Safari.

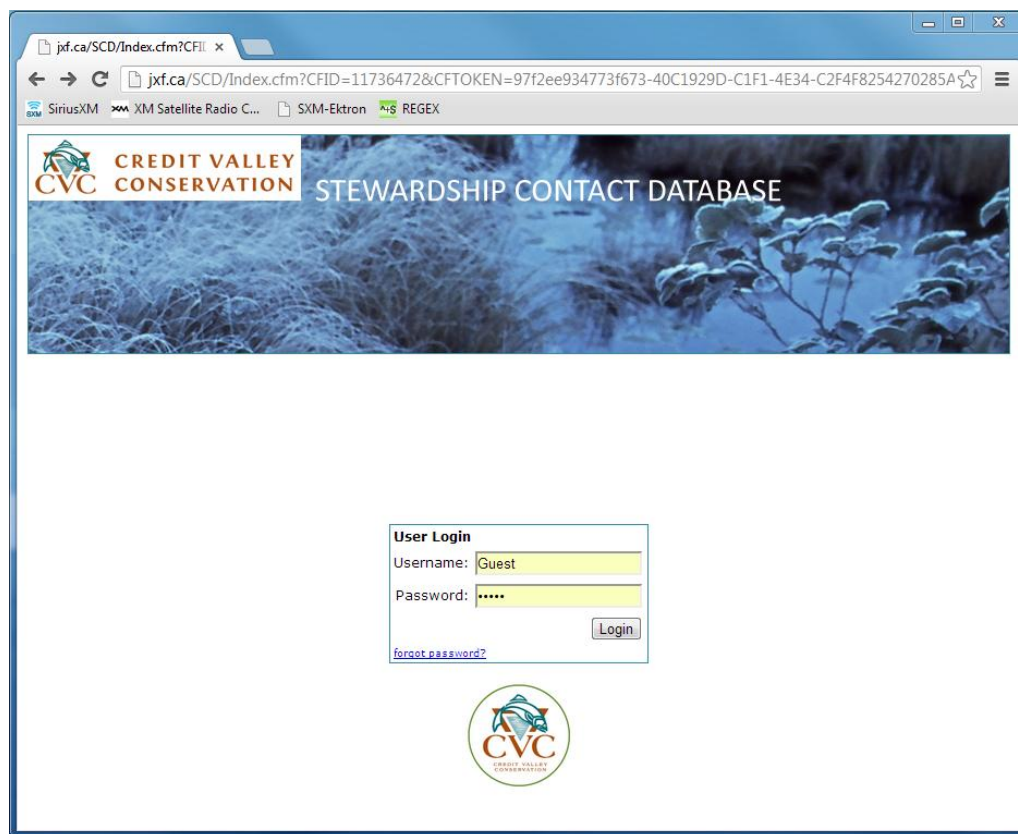
### Navigating to the website

In the top address bar of your browser, enter the address: <http://www.jxf.ca/SCD>



### Logging in

This will open the main landing page for the Stewardship Contact Database, you will be asked to provide your login credentials. Guest users will be assigned login credentials, if you don't have credentials to use this application, please contact the Stewardship administrator to get set up.



Login Landing Page (fig 1)

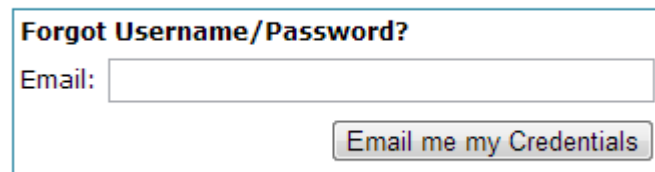
## Stewardship Contact Database Application

Enter your Username (in this example the username is “Guest” and password is “Guest” (no quotes) and click login. Note that your password is not visible as you type it, and it is case sensitive.

If you mistype your password, or enter invalid credentials, you will be advised that your credentials are invalid, and you can correct your entry and try again.

### Forgot password

If you have forgotten your password and are not using the “Guest” login, it can be emailed to you by clicking the “forgot password?” link and entering your email address;



**Forgot Username/Password?**

Email:

[Email me my Credentials](#)

fig 2

An email containing your username and password is sent to your email account from the administrator (admin) with the subject line “Your Credentials”.



Be sure to check your junk mail folder if you don't see this email in your inbox!



## The Application

After you have successfully logged in to the application, you will be directed to the main page, Contacts.

For your enjoyment, the page header randomly selects a scenic graphic.

## Contacts

This is the main page of the application and displays pages of contact information. You can sort the sort and search people from these pages.



Logged in as: **Guest (visitor)** [logout](#)

**CREDIT VALLEY CVC CONSERVATION** **STEWARDSHIP CONTACT DATABASE**

[Contacts](#) [Locations](#) [Outreach](#)

**Contacts** [add a new contact](#)


view	First Name	Last Name	Organization	Address	City	Prov	Postal	email
	Archie	Andrews	Caledon Farmers Association	15891 McLaughlin Road	Caledon	On	L7C 2A9	
	Alex	Dunphy		14369 Creditview Road	Cheltenham	ON	L7C 1N3	
	Claire	Dunphy		14369 Creditview Road	Cheltenham	ON	L7C 1N3	
	Haley	Dunphy		14369 Creditview Road	Cheltenham	ON	L7C 1N3	
	Luke	Dunphy		14369 Creditview Road	Cheltenham	ON	L7C 1N3	
	Phil	Dunphy		14369 Creditview Road	Cheltenham	ON	L7C 1N3	
	Fred	Flintstone	Slate Quarries	3147 Mayfield Rd	Brampton	ON	L6Z 4P9	

Fig 3

You will see your login name at the top right of the page, the page header with 3 choices

- **Contacts** – view information about contacts (People)
- **Locations** – view information about locations (Places)
- **Outreach** – view Outreach programmes (Activities)

Clicking on any of these links will open a new page.

If the contact has provided an email address, clicking the envelope icon  will open an email to that individual.

## Search

Searches are sensitive to the page they are displaying. If you are on the Contact page, this searches the Contact information. Searches are “contains” for example; searching for Fred Flintstone you could enter “stone” (without the quotes). Searches are not case sensitive, and you can use quotes and other characters.

## Stewardship Contact Database Application

The search box on the contact menu allows you to enter a keyword to locate a specific person, by first name or last name. Additionally, a search is also performed for postal codes and organizations.

### Last Name Search



A pop-up application to search by last name (Surname) can be launched by clicking the binoculars icon. This opens a new window and simply searches by last name for contacts.

Name	Address	City	Organization	Phone
Betty Rubble	3149 Mayfield Road	Brampton	Slate Quarries	905-790-9997
Bam Bam Rubble	3149 Mayfield Road	Brampton		905-790-9997
Barney Rubble	3149 Mayfield Road	Brampton		905-790-9997

Fig 4

### Viewing Details



The main content of the contact page shows a list of the people in the database. Each record in the database is for an individual, and clicking the magnifying glass beside the row will show the details of that person.

### Volunteers



Some people in the Contact database have volunteer information kept about them; these individuals are further identified by the “I volunteer” hand icon beside their name. Not all contacts have volunteer profiles associated with their information, because it has not been captured and recorded.

### Sorting

At the top of the contact listing are clickable table column heading

#### Contacts




view	First Name	Last Name	Organization	Address	City	Prov	Postal	email
	Archie	Andrews	Caledon Farmers Association	15891 McLaughlin Road	Caledon	On	L7C 2A9	
	Alex	Dunphy		14369 Creditview Road	Cheltenham	ON	L7C 1N3	

Fig 5

Clicking the column heading will re-sort the display (and subsequent pages) in ascending order by the values in that column.

- First Name Sorts the data by first name
- Last Name Sorts the data by last name (default)
- Organization Sorts the data by Organization
- City Sorts the data by City
- Postal Sorts the data by Postal code

## The Contact Details Page - Viewing Details

Clicking the magnify icon shows the details page for that individual.

The screenshot shows a web browser window titled "CVC Contacts" with the URL "jxf.ca/scd/User/dsp\_details.cfm?l=3". The browser's address bar shows "jxf.ca/scd/User/dsp\_details.cfm?l=3". The page header includes the "CVC CREDIT VALLEY CONSERVATION" logo and the text "STEWARDSHIP CONTACT DATABASE". A navigation bar contains links for "Contacts", "Locations", and "Outreach", along with a search bar. The page is logged in as "Guest (visitor)" with a "logout" link.

The main content area is titled "Contact Details" and contains a form for Archie Andrews. The form is divided into two sections: "Contact Details" and "Relationships".

**Contact Details:**

- Salutation: Mr.
- \* First Name: Archie
- \* Last Name: Andrews
- Biz Phone: 111-111-1111
- Biz Ext: 222
- Res: 777-777-8888
- Fax: 222-222-2222
- Other:
- Address: 15891 McLaughlin Road
- City: Caledon
- Prov: On
- Pcode: L7C 2A9
- Country: Canada
- Email: bettyorveronica@mail.com
- Organization: Caledon Farmers Association
- Sub: Subscribed
- Inactive: ☐

**Relationships:**

- Locations & Activities
- Categories & Notes
- Map
- Relationships
- Locations: 15891 McLaughlin Road
- Activities & Communications
- Outreach Project
- Activity Category: Display Booth
- Started: 20-Dec-12
- Completed: 20-Dec-12

Fig 6

Clicking one of the 3 tabs will show additional details for that individual.

## Relationships

If there is a family or other relationship identified for this contact the details are shown.

## The Volunteer Contact Details Page - Viewing Details

The volunteer details page contains the same contact information, but additionally shows 9 accordion tabs of information that match the paper Volunteer form.

▼ Volunteer Activity

Started: 10-Oct-12 .. Ended: 10-Oct-12 ..

Event: Tree Planting

Event Type/Vol Pos: Planter

Location:

Municipality: Caledon

Subwatershed: Credit River

UTM Coord:

Coordinator: Dept/Team:

No. Shifts: 1 No. Hours: 6

▶ The Source for Events

▶ Administrative Records

▶ Areas of Interest

▶ Availability

▶ Skills & Experience

▶ Experience, Interest & Certifications

▶ Languages

▶ Additional Information

Fig 7

## Locations

Locations are searchable from this menu selection. The Location landing page has 2 sections.

### Search

Searches are sensitive to the page they are displaying. If you are on the Locations page, this searches the Locations information. Searches are “contains” for example; searching for Knox United you could enter “United” (without the quotes). Searches are not case sensitive, and you can use quotes and other characters.


The search box on the menu allows you to enter a keyword to locate a specific location, either by the Location (common) name or by the 911 address. Additionally, a search is also performed for postal codes. Clicking the magnifying glass on the left side of the displayed matches opens the Location Detail page.

### Filter by

On the left side of the location landing page is an accordion populated with two lists. The top list is the distinct cities within the Location database and is ordered in ascending alphabetical order. The second list is the subwatersheds in the CVC area.

Selecting a city or a subwatershed will generate a list of Locations in the righthand section of the screen.

Logged in as: **Guest** (visitor) [logout](#)

 **CREDIT VALLEY CONSERVATION**

STEWARDSHIP CONTACT DATABASE

[Contacts](#) [Locations](#) [Outreach](#)

Filter by:

▼ Cities

[Belfountain](#)  
[Brampton](#)  
[Caledon](#)  
[Caledon East](#)  
[Mississauga](#)

► Subwatersheds

All Locations

view	Location Name	Contacts	City	Subwatershed
	310 Woodland Drive, Belfountain ON		Belfountain	Credit River - Forks of the Credit to Cheltenham
	1 Plain Street		Brampton	Fletchers Creek
	Knox United Church		Caledon	Credit River - Melville to Forks of the Credit
	15891 McLaughlin Road		Caledon	Shaw's Creek
	15876 Escarpment Drive		Caledon East	Credit River - Forks of the Credit to Cheltenham
	123 Generic Road		Mississauga	Loyalist Creek



fig 8



## The Location Details Page - Viewing Details

The detail information for each location also contains related information from Contacts and Outreach.

The screenshot displays the 'Stewardship Contact Database' interface. At the top, there is a header banner with the CVC logo and navigation links for 'Contacts', 'Locations', and 'Outreach'. A search bar is located on the right side of the banner. Below the banner, the 'Locations' section is active, showing a form for '123 Generic Road' in 'Mississauga, ON'. The form includes fields for 'City', 'Province', 'Postal Code', 'Municipality', 'UTM Easting', 'UTM Northing', 'Roll Number', 'Subwatershed', and 'Lot Size Descr'. Below the form, there are two tabs: 'Contacts and Location Activities' and 'Related Documents'. The 'Contacts and Location Activities' tab is selected, showing a table of contacts and an outreach log. The table has columns for 'contact name & address' and 'Property Association'. The outreach log shows a 'CFLW Workshop' with a project category of 'Caring for Your Land and Water Workshop' and a start date of '20-Dec-12'.

**CREDIT VALLEY CONSERVATION CVC** STEWARDSHIP CONTACT DATABASE

[Contacts](#) [Locations](#) [Outreach](#)

**Locations**

Location Name: 123 Generic Road

911 Address: 123 Generic Road

City: Mississauga Province: ON Postal Code: L6H J8K

Municipality: Select UTM Easting: 1111111.1

Roll Number: 222222222222 Lot: UTM Northing: 1111111.1

Subwatershed: Loyalist Creek Lot Size Descr:

**Contacts and Location Activities** **Related Documents**

**Contacts**

contact name & address	Property Association
Jones , Bob - 123 Sumach Rd Caledon	Owner

**Outreach Log**

CFLW Workshop

Project Category: Caring for Your Land and Water Workshop Start: 20-Dec-12 Finish:

Notes: Workshop led by Rural Outreach department to teach rural landowners about agricultural best management practices to enhance source water protection.

fig 9

## Outreach

Outreach programmes are searchable from this menu selection.

## Search

Searches are sensitive to the page they are displaying. If you are on the Outreach page, this searches the Outreach information. Searches are “contains” for example; searching for “Tree Planting” you could enter “Tree” (without the quotes). Searches are not case sensitive, and you can use quotes and other characters.

Clicking the magnifying glass on the left side of the displayed matches opens the Outreach Detail page.

## Outreach Landing Page

This page displays the Outreach projects ordered by descending date. The newest projects are shown at the top of the page.

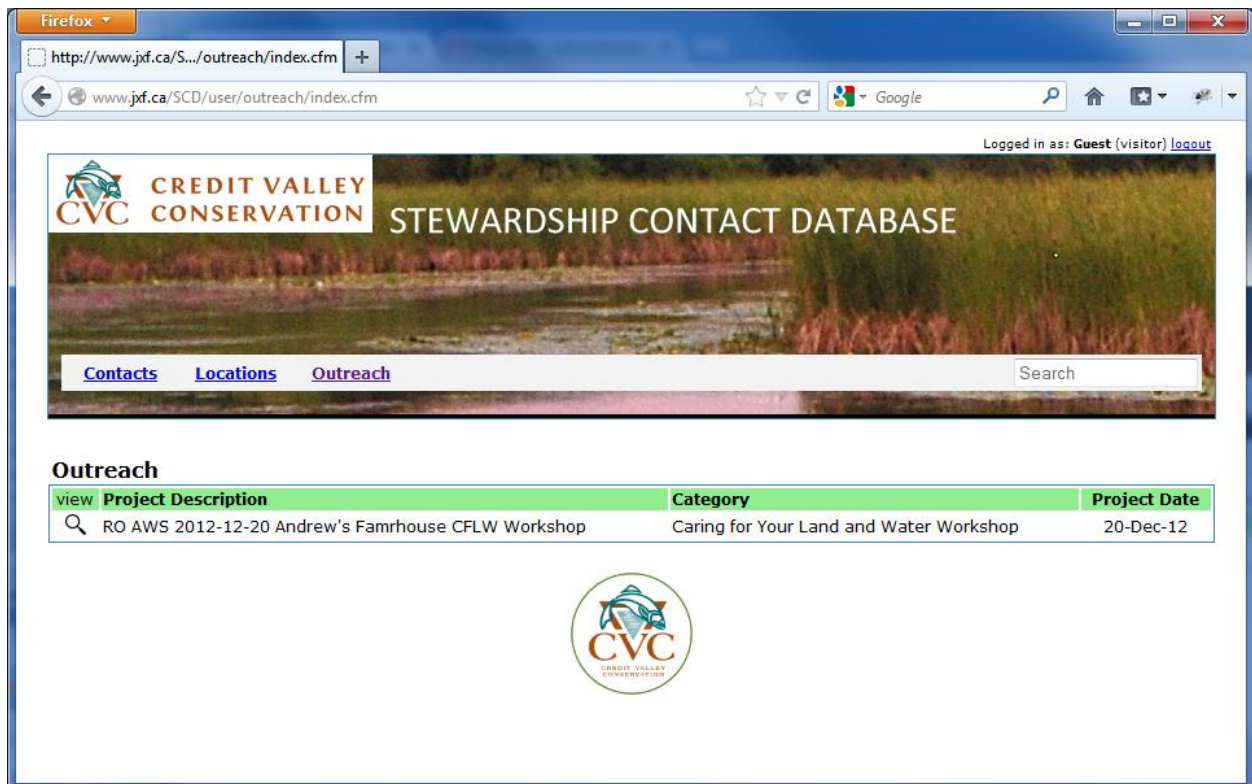
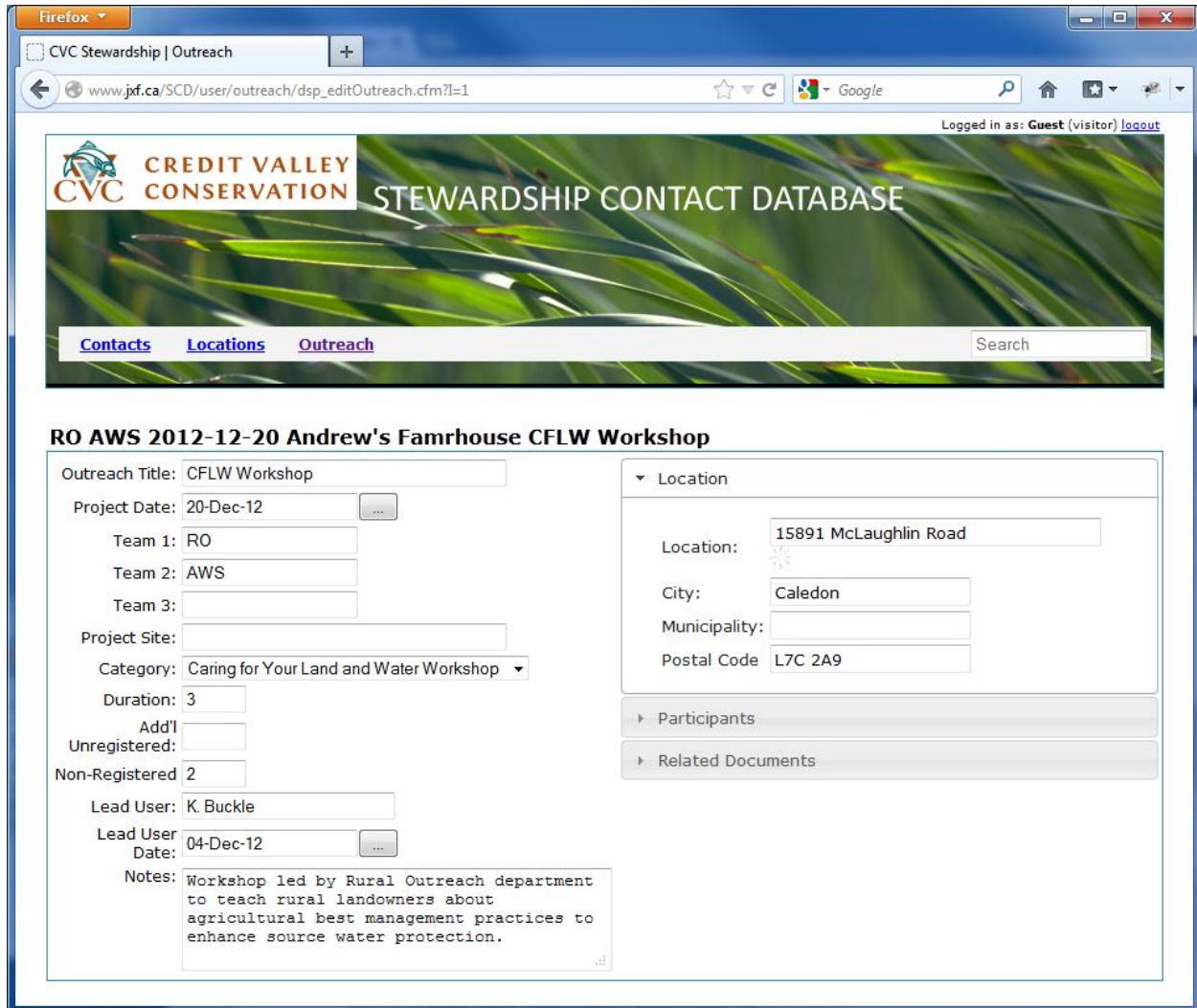


fig 10

## Outreach Details Page

The details of an Outreach are shown on this page. There are 3 tabs on the right side of the page that open to provide additional information about the Outreach.



Firefox

CVC Stewardship | Outreach

www.jpf.ca/SCD/user/outreach/dsp\_editOutreach.cfm?l=1

Google

Logged in as: Guest (visitor) [logout](#)

**CREDIT VALLEY CONSERVATION** STEWARDSHIP CONTACT DATABASE

[Contacts](#) [Locations](#) [Outreach](#) Search

### RO AWS 2012-12-20 Andrew's Famrhouse CFLW Workshop

Outreach Title:	CFLW Workshop
Project Date:	20-Dec-12
Team 1:	RO
Team 2:	AWS
Team 3:	
Project Site:	
Category:	Caring for Your Land and Water Workshop
Duration:	3
Add'l:	
Unregistered:	
Non-Registered:	2
Lead User:	K. Buckle
Lead User Date:	04-Dec-12
Notes:	Workshop led by Rural Outreach department to teach rural landowners about agricultural best management practices to enhance source water protection.

Location

Location: 15891 McLaughlin Road

City: Caledon

Municipality:

Postal Code: L7C 2A9

Participants

Related Documents

fig 11



## Power User's Guide

To use this application, you need to open a web based internet browser like Internet Explorer, Firefox, Chrome or Safari.

### Navigating to the website

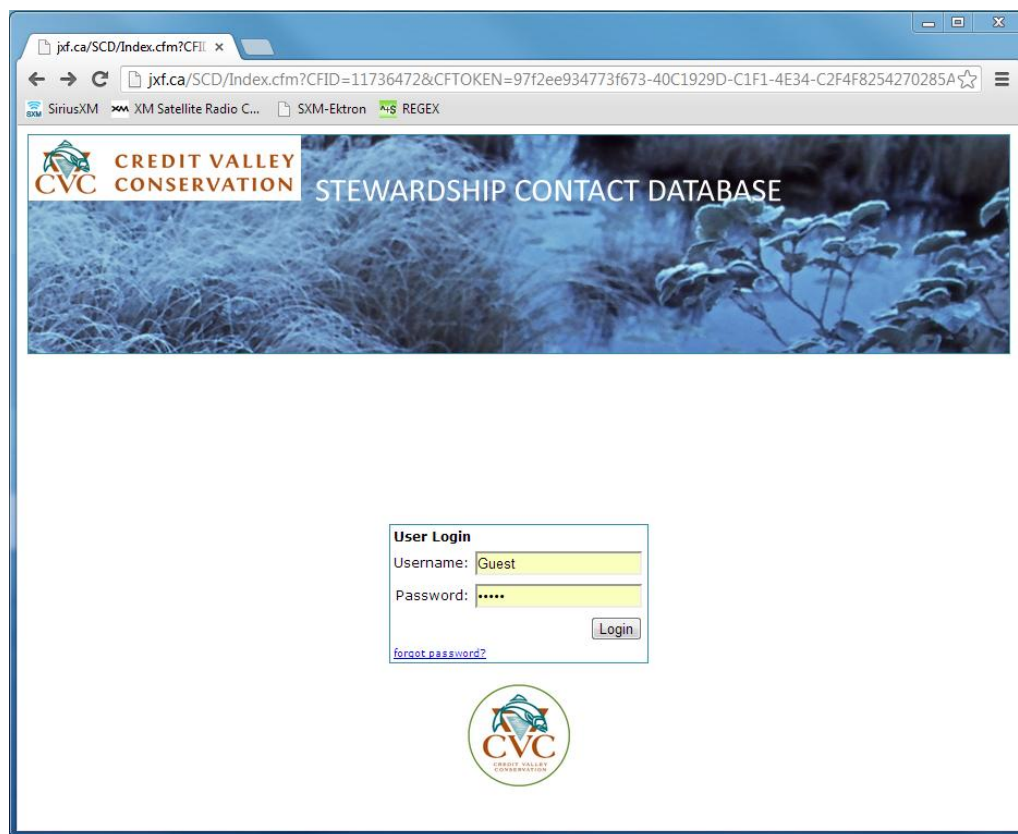
In the top address bar of your browser, enter the address: <http://www.jxf.ca/SCD>



fig 12

### Logging in

This will open the main landing page for the Stewardship Contact Database, you will be asked to provide your login credentials. Guest users will be assigned login credentials, if you don't have credentials to use this application, please contact the Stewardship administrator to get set up.



Login Landing Page (fig 13)

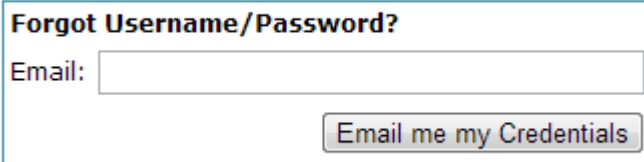
## Stewardship Contact Database Application

Enter your Username (in this example the username is “Guest”) and your password and click login. Note that your password is not visible as you type it, and it is case sensitive.

If you mistype your password, or enter invalid credentials, you will be advised that your credentials are invalid, and you can correct your entry and try again.

### Forgot password

If you have forgotten your password, it can be emailed to you by clicking the “forgot password?” link and entering your email address;



**Forgot Username/Password?**

Email:

[Email me my Credentials](#)

fig 14

An email containing your username and password is sent to your email account from the administrator (admin) with the subject line “Your Credentials”.



Be sure to check your junk mail folder if you don't see this email in your inbox!

Below is a sample email

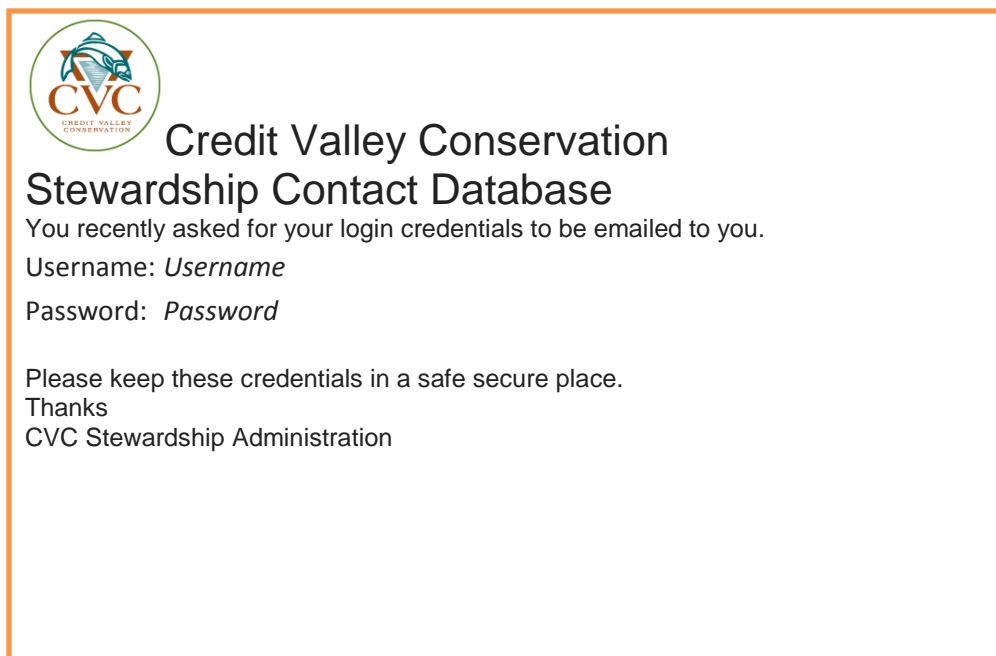


Fig 15


## The Application

After you have successfully logged in to the application, you will be directed to the main page, Contacts.

For your enjoyment, the page header randomly selects a scenic graphic.

## Contacts

This is the main page of the application and displays pages of contact information. You can sort the sort and search people from these pages.



Logged in as: JIMM (jimmy.fusion@cvc.on.ca)

**CREDIT VALLEY CVC CONSERVATION** STEWARDSHIP CONTACT DATABASE

[Contacts](#) [Locations](#) [Outreach](#) [Projects](#) [Relations](#) [Reports](#) [Admin](#)

**Contacts**  [add a new contact](#)









view	First Name	Last Name	Organization	Address	City	Prov	Postal	email	edit
	Archie	Andrews	Caledon Farmers Association	15891 McLaughlin Road	Caledon	On	L7C 2A9		
	Alex	Dunphy		14369 Creditview Road	Cheltenham	ON	L7C 1N3		
	Claire	Dunphy		14369 Creditview Road	Cheltenham	ON	L7C 1N3		
	Haley	Dunphy		14369 Creditview Road	Cheltenham	ON	L7C 1N3		
	Luke	Dunphy		14369 Creditview Road	Cheltenham	ON	L7C 1N3		
	Phil	Dunphy		14369 Creditview Road	Cheltenham	ON	L7C 1N3		
	Fred	Flintstone	Slate Quarries	3147 Mayfield Rd	Brampton	ON	L6Z 4P9		
	Willis	Flintstone		3147 Mayfield Rd	Brampton	ON	L6Z 4P9		

fig 16

You will see your login name at the top right of the page, the page header with 3 choices

- **Contacts** – view information about contacts (People)
- **Locations** – view information about locations (Places)
- **Outreach** – view Outreach programmes (Activities)
- **Projects** – Other programmes that require approvals, funding etc.
- **Relations** – Manage the interrelationships between People, Places and Activities.
- **Reports** – Reporting tools, Uploading tools, query builder.
- **Admin** – Only available to Administrators, managing users and control tables.

Clicking on any of these links will open a new page.

If the contact has provided an email address, clicking the envelope icon  will open an email to that individual.

## Search


Searches are sensitive to the page they are displaying. If you are on the Contact page, this searches the Contact information. Searches are “contains” for example; searching for Fred Flintstone you could enter “stone” (without the quotes). Searches are not case sensitive, and you can use quotes and other characters.



### Contact Search for 'stone'

FirstNames [0]				
<input type="text"/>				
LastNames [2]				
<input type="text"/>				
Wilma Flintstone	3147 Mayfield Rd	Brampton		Wilma9999@Gmail.com
Fred Flintstone	3147 Mayfield Rd	Brampton	Slate Quarries	Fred@slateQuarry.com
Organizations [0]				
<input type="text"/>				
Postal Code [0]				
<input type="text"/>				

fig 17

Clicking on the  magnify icon opens the Contact Details page where more information may be viewed and edited.

## Last Name Search



A pop-up application to search by last name (Surname) can be launched by clicking the binoculars icon. This opens a new window and simply searches by last name for contacts.

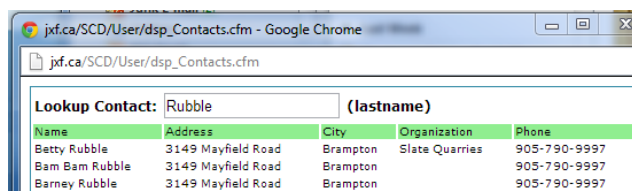





Fig 18

## Viewing and Editing Details

 The main content of the contact page shows a list of the people in the database. Each record in the database is for an individual, and clicking the magnifying glass beside the row will show the details of that person.

## Editing a Contact

 Clicking the Edit icon to the right of a contact will open the edit Contact page. This page contains contact information only.

**Contacts**  [add a new contact](#)






view	First Name	Last Name	Organization	Address	City	Prov	Postal	email	edit
	Archie	Andrews	Caledon Farmers Association	15891 McLaughlin Road	Caledon	On	L7C 2A9		
	Alex	Dunnhy		14369 Creditview Road	Cheltenham	ON	L7C 1N3		


fig 19

## Volunteers



Some people in the Contact database have volunteer information kept about them; these individuals are further identified by the “I volunteer” hand icon beside their name. Not all contacts have volunteer profiles associated with their information, because it has not been captured and recorded.

## Add a new contact

 The link at the top of the page will open an entry page for a new contact. To avoid duplication, you can check to see if the person is already in the database by using the **Last Name Search** pop up option. Both contacts and volunteers may be added.

## Sorting

At the top of the contact listing are clickable table column heading.

Clicking the column heading will re- sort the display (and subsequent pages) in ascending order by the values in that column.


- First Name      Sorts the data by first name
- Last Name      Sorts the data by last name (default)
- Organization    Sorts the data by Organization
- City             Sorts the data by City
- Postal           Sorts the data by Postal code



## Adding a new contact



### Add a New Contact

Salutation: Mr.  
\* First Name:   
\* Last Name:    
Biz Phone:   
Biz Ext:   
Res:   
Fax:   
Other:   
Address:   
City:   
Prov: ON  
Pcode:   
Country: Canada  
Email:   
Organization:   
Sub: Select  
Inactive: ☐

**Relationships**  
☐ Adding a Family?  
☒ Adding a Volunteer?

Add New Contact Add & Add Another

Fig 20

This page is for adding new contacts. You can add one contact, returning to the contact landing page, or by pressing **Add & Add Another** you will add the contact you have just entered, and be presented with this page to add the next contact – this is a fast and preferred method.

## Last Name Search



A pop-up application to search by last name (Surname) can be launched by clicking the binoculars icon. This opens a new window and simply searches by last name for contacts.

jxf.ca/SCD/User/dsp\_Contacts.cfm - Google Chrome

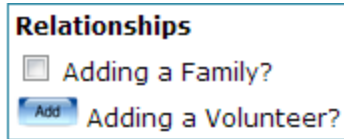
jxf.ca/SCD/User/dsp\_Contacts.cfm

Lookup Contact:  (lastname)

Name	Address	City	Organization	Phone
Betty Rubble	3149 Mayfield Road	Brampton	Slate Quarries	905-790-9997
Bam Bam Rubble	3149 Mayfield Road	Brampton		905-790-9997
Barney Rubble	3149 Mayfield Road	Brampton		905-790-9997

fig 21

## Relationships



The Relationship box has 2 selections, checking the “Adding a Family” will allow the user to add multiple people in a family by pre-populating the form for every subsequent family member. It also creates the family relationship between entries. The adding a family function requires the user to select the **Add & Add Another** button to keep adding

additional family members.

Adding a Volunteer opens the “add a volunteer” form which contains the same information as the contact, and additionally the volunteer form information. If you add a contact, you can add the volunteer profile later. There must be a contact record to have a volunteer profile.

## Add a New Volunteer

This form adds Contact records and Volunteer records in a single operation. If you are working from the Volunteer form, this is the preferred method. Not all Contacts require volunteer profiles.



### Add a New Volunteer

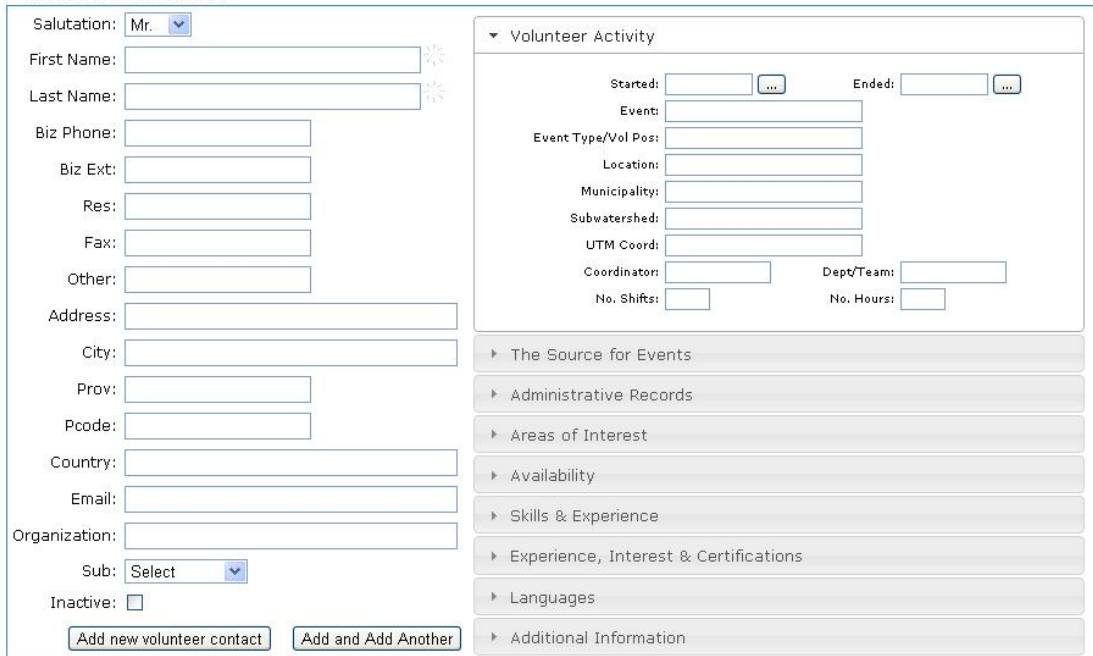


Fig 23

The Volunteer form is made up of 9 panels in an accordion. Clicking on the heading opens that panel. After all the information is entered, the form can be saved by clicking either add button. Clicking “Add new volunteer contact” updates the database and opens the main contact page. Clicking the “Add and add another” updates the database and returns to the “add new volunteer” page to add another volunteer.

## Volunteer Form Elements

The screenshot displays three panels of the Volunteer Form:

- Volunteer Activity**
  - Started:
  - Ended:
  - Event:
  - Event Type/Vol Pos:
  - Location:
  - Municipality:
  - Subwatershed:
  - UTM Coord:
  - Coordinator:
  - Dept/Team:
  - No. Shifts:
  - No. Hours:
- The Source for Events**
  - ☐ Receiving
  - ☐ Denied
  - ☐ Not Asked
- Administrative Records**
  - Resume: ☐
  - Forms Signed: ☐
  - Police Check: ☐
  - First Aid: ☐
  - Interview: ☐
  - General Training: ☐
  - Other Training:



## Stewardship Contact Database Application

### ▼ Areas of Interest

Interest 1

Interest 2

Interest 3

### ▼ Availability

Season

☐

Monday

☐

Tuesday

☐

Wednesday

☐

Thursday

☐

Friday

☐

Saturday

☐

Sunday

☐

Hours per Week

Hours per Month

### ▼ Experience, Interest & Certifications

Relevant skills, experience & interests:

Certifications & Quqlifications:

### ▼ Languages

	Speak	Write
English	<input type="checkbox"/>	<input type="checkbox"/>
French	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

▼ Additional Information



Skill Development/Resume building	<input type="checkbox"/>
Fill up free time	<input type="checkbox"/>
Community Service/ Religious fulfillment	<input type="checkbox"/>
Meet new people	<input type="checkbox"/>
Gain Canadian Experience	<input type="checkbox"/>
Other Reasons	<input type="checkbox"/>


Other Info:

Willing to provide a Police check ☐

Fig 24

### Editing a Contact

When information about a contact changes, the user may click either the  magnify icon or the  edit icon to open the contact information. If the contact is a volunteer, the edit icon opens the volunteer page. Clicking the magnify icon always opens the Contact Details. Searching for a Contact shows the magnify icon and opens the Contact Detail page as well.

No updates are committed to the database until the user clicks the  button.

### Deleting a Contact

Since Contacts make up part of the permanent record, deleting a contact may have far reaching consequences. Marking a Contact as Inactive will remove the Contact from searches, except for the Administrator.

Deleting data from the database may be added in a future release.

## Locations

Locations are searchable from this menu selection. The Location landing page has 2 sections.

### Search

Searches are sensitive to the page they are displaying. If you are on the Locations page, this searches the Locations information. Searches are “contains” for example; searching for Knox United you could enter “United” (without the quotes). Searches are not case sensitive, and you can use quotes and other characters.

The search box on the menu allows you to enter a keyword to locate a specific location, either by the Location (common) name or by the 911 address. Additionally, a search is also performed for postal codes. Clicking the magnifying glass on the left side of the displayed matches opens the Location Detail page.

### Filter by

On the left side of the location landing page is an accordion populated with two lists. The top list is the distinct cities within the Location database and is ordered in ascending alphabetical order. The second list is the subwatersheds in the CVC area.

Selecting a city or a subwatershed will generate a list of Locations in the right-hand section of the screen.

Logged in as: **John** (JohnnyFusion) [logout](#)

view	Location Name	Contacts	City	Subwatershed	edit
	310 Woodland Drive, Belfountain ON		Belfountain	Credit River - Forks of the Credit to Cheltenham	
	1 Plain Street		Brampton	Fletchers Creek	
	Knox United Church		Caledon	Credit River - Melville to Forks of the Credit	
	15891 McLaughlin Road		Caledon	Shaw's Creek	
	15876 Escarpment Drive		Caledon East	Credit River - Forks of the Credit to Cheltenham	
	123 Generic Road		Mississauga	Loyalist Creek	

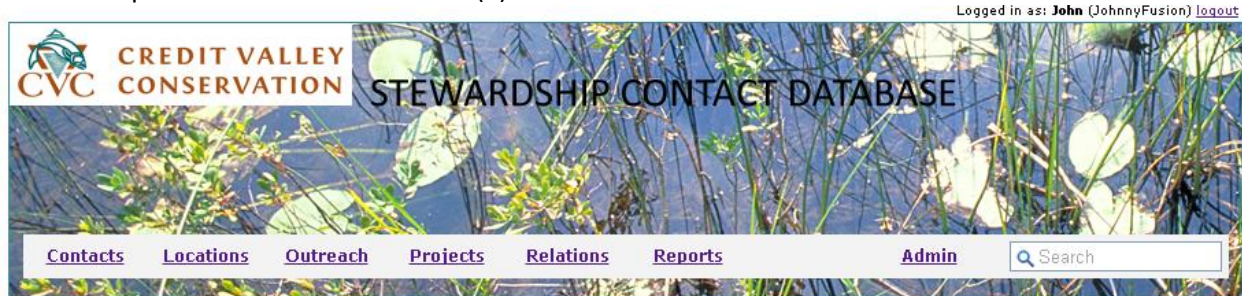


fig 25

## Add a New Location

New locations may be added to the database by clicking the “add new location” link.

The data entry rules force the user to supply the Location Name and the City before a location may be added. Required fields have an asterisk (\*).



### Add a New Location

* Location Name:	<input type="text"/>
911 Address:	<input type="text"/>
* City:	<input type="text"/>
Municipality:	<input type="text"/>
Province:	<input type="text" value="ON"/>
PostalCode:	<input type="text"/>
Lot:	<input type="text"/>
Concession:	<input type="text"/>
Concession Suffix:	<input type="text"/>
Roll Number:	<input type="text"/>
Subwatershed	<input type="text" value="Black Creek"/>
UTM Easting:	<input type="text"/>
UTM Northing:	<input type="text"/>
Notes:	<input type="text"/>
Lot Size Desc:	<input type="text"/>
Lead User:	<input type="text"/>
Lead User date:	<input type="text"/> ...
<input type="button" value="add location"/>	


Fig 26

## The Location Details Page - Viewing Details

The detail information for each location also contains related information from Contacts and Outreach.

The user may edit any of the fields and click Update Location to commit the changes to the database.

Logged in as: **John** (JohnnyFusion) [logout](#)



# STEWARDSHIP CONTACT DATABASE

[Contacts](#)   [Locations](#)   [Outreach](#)   [Projects](#)   [Relations](#)   [Reports](#)   [Admin](#)

### Locations [+ add a new location](#)

Location Name:

911 Address:

Roll Number:

Subwatershed:

City:  Province:  Postal Code:

Municipality:

UTM Easting:

UTM Northing:

Lot:

Lot Size Descr:

[Update Location](#)

Contacts and Location Activities
Related Documents

#### Contacts [add new](#)

contact name & address      Property Association

Jones , Bob - 123 Sumach Rd Caledon

Owner  [update](#)

#### Outreach Log [add new](#)

CFLW Workshop

Project Category: Caring for Your Land and Water Workshop      Start: **20-Dec-12**      Finish:

Notes: Workshop led by Rural Outreach department to teach rural landowners about agricultural best management practices to enhance source water protection.

Fig 27

## Outreach

Outreach programmes are searchable from this menu selection.

## Search

Searches are sensitive to the page they are displaying. If you are on the Outreach page, this searches the Outreach information. Searches are “contains” for example; searching for “Tree Planting” you could enter “Tree” (without the quotes). Searches are not case sensitive, and you can use quotes and other characters.

Clicking the magnifying glass on the left side of the displayed matches opens the Outreach Detail page.

## Outreach Landing Page

This page displays the Outreach projects ordered by descending date. The newest projects are shown at the top of the page.

Logged in as: **John** (JohnnyFusion) [logout](#)



view	Project Description	Category	Project Date	edit
	RO AWS 2012-12-20 Andrew's Famrhouse CFLW Workshop	Caring for Your Land and Water Workshop	20-Dec-12	



fig 28



## Adding a New Outreach

Clicking the “add a new Outreach project” opens the page to add a new Outreach.

Logged in as: **John** (JohnnyFusion) [logout](#)

The screenshot shows the 'Add an Outreach' form in the Stewardship Contact Database Application. The header includes the CVC Credit Valley Conservation logo and the title 'STEWARDSHIP CONTACT DATABASE'. A navigation bar contains links for Contacts, Locations, Outreach, Projects, Relations, Reports, and Admin, along with a search bar. The form itself is divided into two main sections: 'Outreach' and 'Location'. The 'Outreach' section includes fields for Title, Project Date, Team 1, Team 2, Team 3, Project Site, Category (set to 'Volunteer Electrofishing'), Duration, Add'l, Unregistered, Non-Registered, Lead User, Lead User Date, and a large Notes text area. The 'Location' section includes fields for Location, City, Municipality, and Postal Code. A button at the bottom right of the form is labeled 'Add new Outreach Project'.

**Outreach**

Title:

Project Date:  ...

Team 1:

Team 2:

Team 3:

Project Site:

Category:  ▼

Duration:

Add'l:

Unregistered:

Non-Registered:

Lead User:

Lead User Date:  ...

Notes:

**Location**

Location:

City:

Municipality:

Postal Code:

fig 28

This page is not fully functional.

### Edit an Outreach

Clicking the edit  icon beside the Outreach brings up the edit an Outreach page.

The details of an Outreach are shown on this page. There are 3 tabs on the right side of the page that open to provide additional information about the Outreach. Clicking the “Update the Outreach” button will commit the changes to the database.



#### Edit an Outreach - RO AWS 2012-12-20 Andrew's Famrhouse CFLW Workshop

Outreach Title: <input type="text" value="CFLW Workshop"/>	▼ Location
Project Date: <input type="text" value="20-Dec-12"/> ...	Location: <input type="text" value="15891 McLaughlin Road"/>
Team 1: <input type="text" value="RO"/>	City: <input type="text" value="Caledon"/>
Team 2: <input type="text" value="AWS"/>	Municipality: <input type="text"/>
Team 3: <input type="text"/>	Postal Code: <input type="text" value="L7C 2A9"/>
Project Site: <input type="text"/>	► Participants
Category: <input type="text" value="Caring for Your Land and Water Workshop"/> ▼	► Related Documents
Duration: <input type="text" value="3"/>	
Add'l Unregistered: <input type="text"/>	
Non-Registered: <input type="text" value="2"/>	
Lead User: <input type="text" value="K. Buckle"/>	
Lead User Date: <input type="text" value="04-Dec-12"/> ...	
Notes: <input type="text" value="Workshop led by Rural Outreach department to teach rural landowners about agricultural best management practices to enhance source water protection."/>	
<input type="button" value="Update the Outreach"/>	

fig 29



## Projects

This section is incomplete

## Relations

This section is incomplete

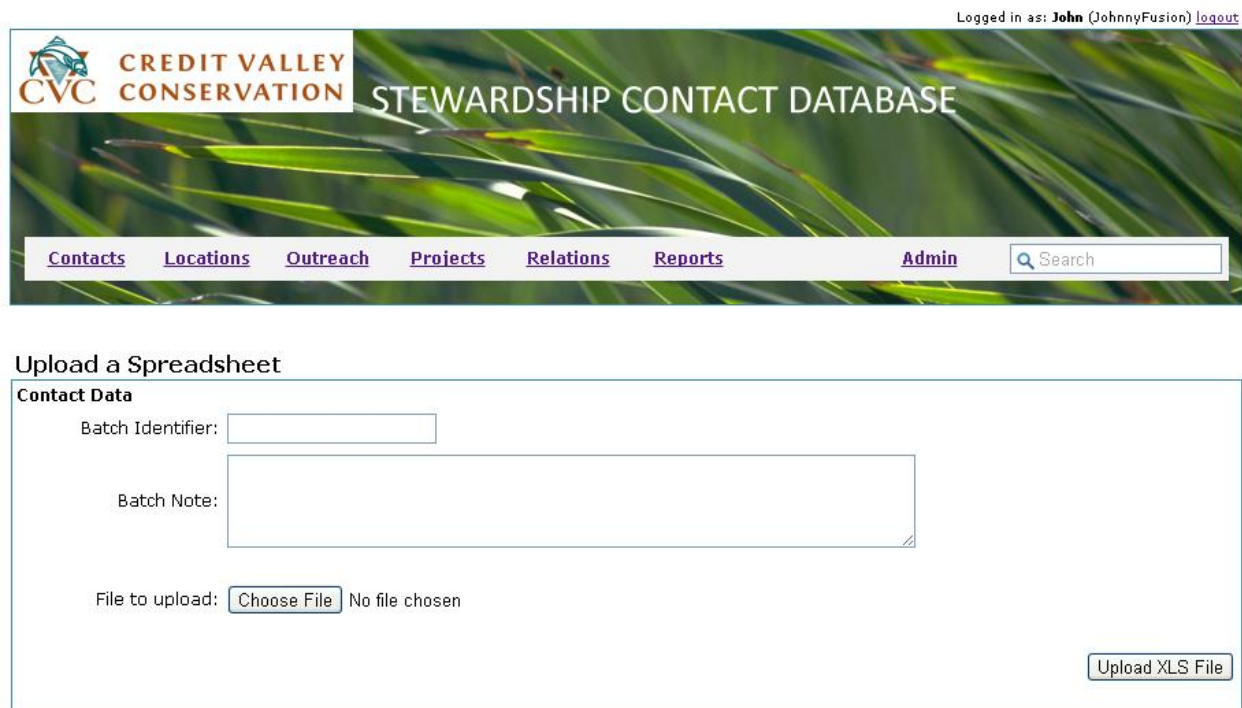
## Reports

Reports, Uploads and other utilities are in this section.

### Upload & Import Contacts

This utility allows the user to create a batch upload for a spreadsheet and will accept most sources including .xls, .xlsx, and OpenOffice documents (MS-Office is not required to upload files) . This reads the spreadsheet to a temporary location before committing the spreadsheet to the database. The batch ID must be unique. The spreadsheet is processed and the User may view the spreadsheet before it is processed.

Batches may be rolled back out of the database if required.



The screenshot displays the 'Stewardship Contact Database' application interface. At the top right, it shows 'Logged in as: John (JohnnyFusion) logout'. The header features the 'CREDIT VALLEY CONSERVATION CVC' logo and the title 'STEWARDSHIP CONTACT DATABASE'. A navigation bar includes links for 'Contacts', 'Locations', 'Outreach', 'Projects', 'Relations', 'Reports', and 'Admin', along with a search bar. The main content area is titled 'Upload a Spreadsheet' and contains a 'Contact Data' section with the following fields:

- Batch Identifier:
- Batch Note:
- File to upload:  No file chosen
- 

fig 30

## Administration

Administration manages the database and the users.



### User Maintenance

[add new user](#)

edit User	Dept	Role	initials	Username	Telephone	Email	Active
<input checked="" type="checkbox"/> Cameron Parrack	PA Community Outreach	Priv.	CP	Cameron	905.670.1615	CParrack@creditvalleyca.ca	Yes
<input checked="" type="checkbox"/> David Beaton	Mgr Comm Outreach	Admin, Priv.	DB	David	905.670.1615 x 426	dbeaton@creditvalleyca.ca	Yes
<input checked="" type="checkbox"/> Guest	visitor	Guest	G	Guest			Yes
<input checked="" type="checkbox"/> Lisa Brusse	Mgr, Rural Outreach	Priv.	LB	Lisa	905.670.1615	LBrusse@creditvalleyca.ca	Yes
<input checked="" type="checkbox"/> Mike Thorpe	Mgr Land Planning & Mgmt	Guest	MT	Mike	905.670.1615	MThorpe@creditvalleyca.ca	Yes



fig 31

## Add a New User

Use this form to add a new user and grant them access to the database.



### Add a New User

[add new user](#)

User Full Name:	<input type="text"/>
User Login Username:	<input type="text"/>
User Password:	<input type="password"/>
Initials:	<input type="text"/>
Department:	<input type="text"/>
Telephone:	<input type="text"/>
Email:	<input type="text"/>
Role:	<input type="radio"/> Guest <input type="radio"/> Regular <input type="radio"/> Privileged
Administrator:	<input type="checkbox"/>
User added on:	<input type="text" value="03-Jan-13"/>
<input type="button" value="add new user profile"/>	

fig 32

### Notes on Users:

The User's login username is not case sensitive, however the password is. User's Initials appear on pages to show who performed an addition or update.

3 "Roles" are available, however this implementation doesn't differentiate between Regular and Privileged users at this time. An additional privilege of "Administrator" allows any category of user (including a guest) to have access to this section.

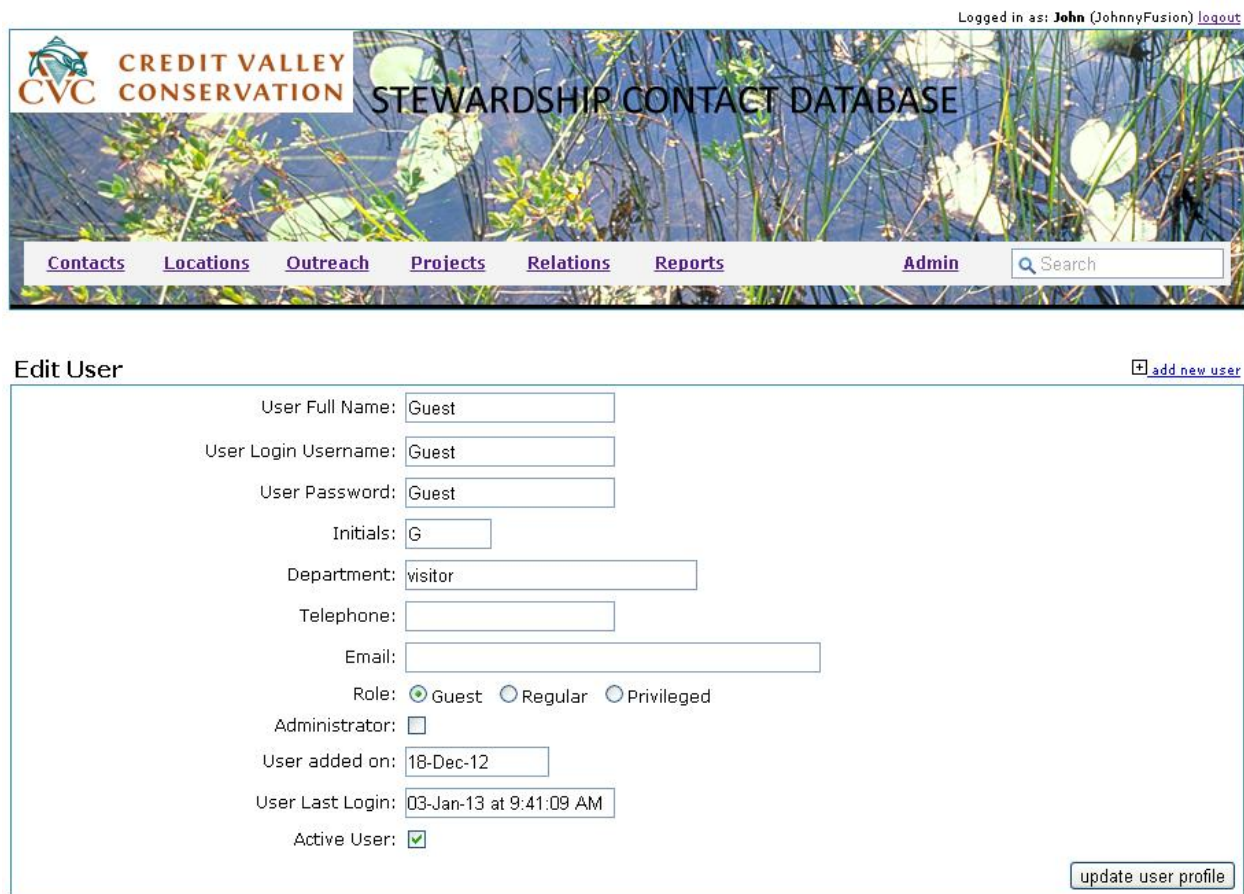
When a user is added, they are immediately marked active. Use the Edit function to suspend a user's privileges. The user will be suspended after they time out, log out or close their browser.

The system records the date and time that the user last logged in to use the application.

### Edit a User

This page allows the administrator to change a user's information. Un-checking Active User will deny someone using the displayed credentials to log on to the application.

Logged in as: **John** (JohnnyFusion) [logout](#)



**CREDIT VALLEY CONSERVATION CVC** STEWARDSHIP CONTACT DATABASE

[Contacts](#) [Locations](#) [Outreach](#) [Projects](#) [Relations](#) [Reports](#) [Admin](#)

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#### Edit User

[+ add new user](#)

User Full Name:	<input type="text" value="Guest"/>
User Login Username:	<input type="text" value="Guest"/>
User Password:	<input type="text" value="Guest"/>
Initials:	<input type="text" value="G"/>
Department:	<input type="text" value="visitor"/>
Telephone:	<input type="text"/>
Email:	<input type="text"/>
Role:	<input checked="" type="radio"/> Guest <input type="radio"/> Regular <input type="radio"/> Privileged
Administrator:	<input type="checkbox"/>
User added on:	<input type="text" value="18-Dec-12"/>
User Last Login:	<input type="text" value="03-Jan-13 at 9:41:09 AM"/>
Active User:	<input checked="" type="checkbox"/>

[update user profile](#)

fig 33

## Support /Contact

For clarification of any of the above information regarding this user guide, please contact the authors.

For reporting bugs or defects please use your teamworkpm© account.